

# SOCIAL MEDIA APPLICATIONS FOR UNCONVENTIONAL WARFARE

A thesis presented to the Faculty of the U.S. Army  
Command and General Staff College in partial  
fulfillment of the requirements for the  
degree

MASTER OF MILITARY ART AND SCIENCE  
Conflict, Security, and Development

by

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2013-02

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<b>REPORT DOCUMENTATION PAGE</b>				<i>Form Approved</i> <i>OMB No. 0704-0188</i>	
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<b>1. REPORT DATE (DD-MM-YYYY)</b> 13-12-2013		<b>2. REPORT TYPE</b> Master's Thesis		<b>3. DATES COVERED (From - To)</b> FEB 2013 – DEC 2013	
<b>4. TITLE AND SUBTITLE</b>  Social Media Applications for Unconventional Warfare				<b>5a. CONTRACT NUMBER</b>	
				<b>5b. GRANT NUMBER</b>	
				<b>5c. PROGRAM ELEMENT NUMBER</b>	
<b>6. AUTHOR(S)</b>  MAJ Nathanael O. Burnore				<b>5d. PROJECT NUMBER</b>	
				<b>5e. TASK NUMBER</b>	
				<b>5f. WORK UNIT NUMBER</b>	
<b>7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)</b> U.S. Army Command and General Staff College ATTN: ATZL-SWD-GD Fort Leavenworth, KS 66027-2301				<b>8. PERFORMING ORG REPORT NUMBER</b>	
<b>9. SPONSORING / MONITORING AGENCY NAME(S) AND ADDRESS(ES)</b>				<b>10. SPONSOR/MONITOR'S ACRONYM(S)</b>	
				<b>11. SPONSOR/MONITOR'S REPORT NUMBER(S)</b>	
<b>12. DISTRIBUTION / AVAILABILITY STATEMENT</b> Approved for Public Release; Distribution is Unlimited					
<b>13. SUPPLEMENTARY NOTES</b>					
<b>14. ABSTRACT</b> What role might social media play in proxy and actual military campaigns? Professional thinking on the role of social media in military operations is nascent and uninformed by cutting-edge scholarship on contemporary social and political action. Applying abductive reasoning, I analyze existing scholarship to develop a framework for integrating social media considerations into the military professional's thinking on planning and conducting operations. I show that the rise of social media has fundamentally changed collective action. Individuals now play an equal or greater role than organizations in political action through powerful narratives, while traditional organizations and networks have evolved in nature and increased in complexity. This change necessitates the skilled employment of social media at the tactical level by MISO operators. I further apply this framework to unconventional warfare, an inherently interagency operation that bears the greatest similarity to recent resistance campaigns around the world, to explore the possibilities of social media intervention. This study has implications for how interagency partners, policymakers, strategists, and military commanders and planners think about and plan for social media integration not just for unconventional warfare, but into all military operations.					
<b>15. SUBJECT TERMS</b> Social Media, Unconventional Warfare, Collective Action, Psychological Operations, Military Information Support Operations, Digital Activism					
<b>16. SECURITY CLASSIFICATION OF:</b>			<b>17. LIMITATION OF ABSTRACT</b>  (U)	<b>18. NUMBER OF PAGES</b>  84	<b>19a. NAME OF RESPONSIBLE PERSON</b>
<b>a. REPORT</b> (U)	<b>b. ABSTRACT</b> (U)	<b>c. THIS PAGE</b> (U)			<b>19b. PHONE NUMBER (include area code)</b>

MASTER OF MILITARY ART AND SCIENCE  
THESIS APPROVAL PAGE

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The opinions and conclusions expressed herein are those of the student author and do not necessarily represent the views of the U.S. Army Command and General Staff College or any other governmental agency. (References to this study should include the foregoing statement.)

## ABSTRACT

SOCIAL MEDIA APPLICATIONS FOR UNCONVENTIONAL WARFARE, by  
Major Nathanael Burnore, 84 pages.

What role might social media play in proxy and actual military campaigns? Professional thinking on the role of social media in military operations is nascent and uninformed by cutting-edge scholarship on contemporary social and political action. Applying abductive reasoning, I analyze existing scholarship to develop a framework for integrating social media considerations into the military professional's thinking on planning and conducting operations. I show that the rise of social media has fundamentally changed collective action. Individuals now play an equal or greater role than organizations in political action through powerful narratives, while traditional organizations and networks have evolved in nature and increased in complexity. This change necessitates the skilled employment of social media at the tactical level by MISO operators. I further apply this framework to unconventional warfare, an inherently interagency operation that bears the greatest similarity to recent resistance campaigns around the world, to explore the possibilities of social media intervention. This study has implications for how interagency partners, policymakers, strategists, and military commanders and planners think about and plan for social media integration not just for unconventional warfare, but into all military operations.

## ACKNOWLEDGMENTS

I would like to thank LTC(P) Celestino Perez for his inspiration and tutelage over the past year, as well as my fellow Local Dynamics of War scholars for all the meaningful discussion and contributions over this course of study.

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## ACRONYMS

ADRP	Army Doctrine Reference Publication
ARSOF	Army Special Operations Forces
ATP	Army Training Publication
DOD	Department of Defense
FM	Field Manual
MISO	Military Information Support Operations
SF	Special Forces
SOF	Special Operations Forces
TC	Training Circulation
USAJFKSWCS	U.S. Army John F. Kennedy Special Warfare Center and School (also SWCS)
UW	Unconventional Warfare

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## CHAPTER 1

### INTRODUCTION

Message to the regime: The people on the streets raise the level of their demands with every passing hour. The current demand that needs to be fulfilled as fast as possible is for the president to step down and leave Egypt.

5,514 Likes    5,030 Comments    1,013,841 Views

— Wael Ghomin, *Revolution 2.0*

Since the beginning of the 21st century, the world has experienced two significant developments that demand our attention. The first, of considerable importance to U.S. Army Special Operations Forces (ARSOF), is the renewed emphasis on unconventional warfare (UW) operations. This operation relies on interagency collaboration to set conditions for the clandestine insertion of Special Forces (SF) operators to enhance an internal resistance movement within a hostile country or occupying force. The SF unit then assists in training, coordinating, and recruiting resources in order for the resistance movement to conduct operations to coerce, disrupt, or overthrow the hostile regime (Department of the Army 2012). Since the Cold War this mission had almost disappeared from the ARSOF training and operational repertoire, and some within the broader Special Operations Forces (SOF) community predicted its inevitable extinction.

However, following the 9/11 attacks, the U.S. successfully initiated or enhanced operations in both Afghanistan and Iraq through doctrinal UW operations. Following this reemergence, ARSOF leaders have refocused efforts on ensuring that all SOF are proficient in conducting UW, and it remains the primary mission of Special Forces soldiers. In the last few years the U.S. Army John F. Kennedy Special Warfare Center and School (USAJFKSWCS, or SWCS) at Fort Bragg, North Carolina, has published

new doctrine on UW in an attempt to modernize older, pre-9/11 doctrine. This thesis focuses on a change that emerged in doctrine two months before the publication of this thesis—the incorporation of social media in UW.

The rise of social media constitutes the second significant and widely unforeseen event to emerge. This new phenomenon of mass dissemination of consumer produced information has exploded within the last decade, and has arguably had a significant enhancing effect on the scope of most of the social and political movements that the world has recently seen. The most notable and widely referenced examples came from the 2011 Arab Spring uprisings, in which social media played a momentous role in organizing and coordinating activists' movements, and in publishing successes to the world. Even though the specific extent of the role social media played is a topic for considerable debate, the impact of its presence on these political movements cannot be ignored.

Although scholars across many disciplines (sociology, psychology, economics, and political science) have explored the nature of this new technology as well as its effects on the world, the Department of Defense (DOD) has remained largely rooted in a more conventional past. As mentioned earlier the U.S. military, and specifically the Army, had not incorporated social media use into any doctrine until 2013. Only in 2012 did any discussion on social media use in military operations emerge. This is the gap that I identify in chapter 2, the literature review. So is social media worth considering as an operational enhancer? If so, how, and at what level could it best be employed? By whom? These are the questions that this thesis seeks to examine.

Chapter 3, methodology, discusses the way in which I undertake this journey. It begins by describing the method used, abductive reasoning. Abductive reasoning is a process of gathering different points of views, or variables, and placing them together in order to form a more comprehensive picture of the problem or question. The first step then is to gather all, but particularly the most recent, scholarly literature on social media's footprint in the world today and ascertain whether or not it is worth further exploring as an agent to enhance operational success. Besides gathering historical data on the usage of social media in recent protests and uprisings, I analyze multiple recent scholarly works that shine a different light on why social media emerged as a successful contributor to political activism and resistance.

In chapter 4, the analysis, I begin by offering a brief and admittedly less than comprehensive history of social media use in recent movements of protest and uprising in order to demonstrate its prominence and the wide spectrum of ways in which it is used. It is interesting to note that most social/political movements since at least 2005 have contained an element of social media usage. As activists and resistance groups use it to recruit, organize, coordinate actions on the ground, and exploit success, many authoritarian regimes struggle to block or contain it, use it to propagate their own message or narrative, or use it to identify dissenters and repress them. The latter efforts of containment by authoritarian regimes are becoming increasingly more difficult with the inevitable spread of technology, and access to the Internet and mobile devices.

Next, I use recent scholarship to explore some fundamental reasons why social media is such an effective agent for activism, resistance, and revolution. The answer to this is divided into two distinct parts for analysis: social media's effect on the concept of

the individual, and its effect on groups, organizations, and networks. At the individual level, although social media did not create the trend towards individualism, it has certainly amplified it. Various scholars have analyzed different aspects of this emerging characteristic, and even though overlapping complimentary conclusions occur, many findings are unique and significant. One recent work finds causation for this phenomenon in the greater array of choices and avenues of expression that people have to choose from today (Bimber, Flanagin, and Stohl 2012). Hands finds significance in the amplification of the initial sense of resistance (Hands 2011). Along with this individualism comes the weakening of ties between people, as well as between people and organizations (Bennett and Segerberg 2013). Others find that individual involvement in movements results from a lower cost inherent to online activist participation, due to both the level of investment in a cause and the alternative to a physical space to converge for organizing (Earl and Kimport 2011; Gerbaudo 2013).

One significant shift caused by social media usage is that individuals have emerged as equal to or more significant than organizations (Earl and Kimport 2011; Bennett and Segerberg 2012). An analysis of organizations, networks, and collective action offers some interesting and significant results. In contrast to initial scholarship that portrayed digitally organized groups as leaderless (Shirky), center less (Castells), and a swarm (Hardt and Negri 2009), recent scholars (Bimber, Flanagin, and Stohl 2012; Gerbaudo 2013; Faris 2013) refute these conclusions. They argue that a loose structure and subtle hierarchy still exists within organizations. In addition to traditional organizations, social media has caused the emergence of the organization-less or self formed organizations as well as a various degree of hybrid organizations that contain

components of both (Bimber, Flanagin, and Stohl 2012). Combinations of these organizations along with individuals collide for a purpose or to achieve a goal, forming networks. Networks have likewise evolved from their traditional past, consisting of two or more formal organizations, into more complex and interrelated entities. Modern networks may be more traditionally brokered by an organization within them. However, the world is seeing an increasing number of crowd-enabled networks with no organizational component, or networks enabled by organizations with minimal formal involvement (Bennett and Segerberg 2013). As the first type of network lends itself to traditional collective action, the latter two primarily conduct “connective action” (Bennett and Segerberg 2013).

Using these new notions of the individual, organizations, networks, and collective action, I next create a framework that more accurately captures the nature of social and political action in the world today. I then compare it to a traditional social/political action framework before the existence of social media. The difference is striking enough to illustrate the significance that social media has had on resistance and rebellion, introducing a complexity that would be foolish, even dangerous, to ignore in military operations. I next take this framework and integrate it into the UW mission, largely as an experimental action to determine the degree of applicability that unfolds. The application of this framework to UW follows logically from its similarities to the resistance movements that have occurred throughout the world, all of which include social media as a key component.

To begin with, I explore ways in which social media may be employed in what the military informally refers to as “phase zero” operations, which are the shaping

operations that occur before formal engagement is finalized or deemed necessary. Using recent scholarly work on the benefits of nonviolent resistance movements, I suggest that social media may be employed before a UW mission is committed. Further, if a campaign of nonviolent resistance is organized successfully, the chances of the movement achieving its political goals (and U.S. strategic goals) increases along with the likelihood of the results' longevity. Additional works by Christia and Naim refer to the growing decentralization or fracturization of the world, further necessitating the creation of ties between different elements in any movement, for which social media is extremely well-suited. In the event that the phase zero campaign is not successful, I apply my framework to a doctrinal UW campaign, proceeding through phases of successful Arab Spring movements (as proposed by Howard and Hussain). The phases are as follows: the preparation phase, the ignition phase, the protest phase, the climax phase, and the follow-on information warfare phase. Throughout these phases I present a myriad of experimental actions and proposed interventions in which MISO could employ social media to enhance a UW operation. This discussion draws on some further scholarship on conflict and resolution which I also weave into my framework.

Based on my new framework for modern social/political action, the preparation phase involves identifying digitally connected individuals that could act as soft leaders in the movement and forming ties with and between various hybrid and organization-less organizations. Social media can also serve here to enhance the movement's underground. For the ignition phase, social media amplifies a narrative strong enough to create a spark to fuse individuals and organizations together to form a resistance network. The protest phase takes the necessary step of bringing the movement to the streets to combine

collective action with the online connective action. Social media also enhances this phase through the ability to shape emotions and moderate the character of the collective action. In the climax phase, if the regime does not meet the demands of the movement, social media plays a key role in coordinating action on the ground and managing violence to keep the network focused on its principal goals. In the final phase, follow-on information warfare, social media creates new networks that focus on nurturing newly formed institutions and preventing an upset in the balance of power between these institutions and the public.

I conclude by summarizing the findings of this thesis and emphasizing the necessity of a social media component in military operations, based on the analysis in chapter 4. I then recommend that my new framework for social/political action be applied to the full spectrum of military operations in order to analyze wider potential uses of social media in military action. I further recommend that MISO take greater ownership of social media usage within SOF and seek to gain the authorities necessary for its employment at the tactical level to support UW and other military operations.

It is important to note here that UW requires strong interagency involvement. Hence, my conclusions on the application of social media within it certainly bear relevance outside of the SOF community. Various U.S. intelligence agencies as well as the State Department can benefit from this work with regards to UW specifically. However, expanding this research to all military operations will include the full range of interagency partners who usually work side by side with the military to accomplish U.S. national goals and objectives through unified action. The focus on UW within this thesis should not create the false impression that my findings are only relevant for this mission.

The application of my framework to UW constitutes experimental action to explore the whole range of possibilities of social media use, and thus should prod the reader to want to expand these possibilities throughout the spectrum of military operations.

It is also important to stress that the findings and recommendations in this thesis are meant to apply solely to the execution of legitimate and ethical missions that reflect U.S. strategic goals. This work should not be viewed as providing methods for military units and interagency partners to intervene haphazardly across the globe, without regard for strategic interest. The leveraging of social media as suggested in this thesis should complement approved operations in matters of U.S. national security, such as the recent operations in Afghanistan and Iraq.

For the purposes of this thesis, the platforms that I consider to be social media platforms include sites in which user-generated content can be quickly disseminated worldwide to an indeterminate number of subscribers. Examples would be Facebook, Twitter, YouTube, and blog sites. As an extremely high number of these sites currently exist and more emerge daily, for the purposes of this research it would be pointless to provide an inclusive list of all social media platforms. However, for UW application this leads to an ever increasing number of platforms that may be used in digitally restricted or semi-restricted environments.



## CHAPTER 2

### LITERATURE REVIEW

Although literature and scholarly work regarding social and digital media abounds among civilian sociologists, psychologists, economists, and political scientists, a search for discussion on this topic within the DOD and U.S. military (at least at the unrestricted level) yields minimal results. A more striking divide between theorists and practitioners would be difficult to find. As academics and theorists provide these rich and diverse perspectives on different aspects of the world today, it falls to practitioners such as the military to absorb this knowledge and incorporate it into tactics, techniques, and procedures. Instead, much of the military views the emergence of social media as an anomaly to be constrained, controlled, and restricted when it comes to our enemies using it. Internally, units largely lament its use as enhancing operational security violations.

Even within the special operations community, where covert and clandestine activity could potentially be enhanced through social media, its mention even in doctrine is an extremely recent occurrence. The danger in this could manifest in the form of special operators now trying to adhere to doctrine in order to stay current, while not understanding the nature of social media and its effects on different structural elements in the operational environment and the world as a whole. The resulting failure to properly employ social media to enhance operations can have widespread and embarrassing repercussions. The literature gap that I aim to illuminate here is the absence of work within the defense community to incorporate the scholarly work on social media characteristics and usage into the potential for military operational and tactical

employment, which currently ill-prepares the special operator to use the most recent doctrine as expected.

This literature review begins with a mention of the two manuals that include social media usage. Both manuals, Field Manual (FM) 3-53, *Military Information Support Operations* (Department of the Army 2013) and Army Training Publication (ATP) 3-05.1, *Unconventional Warfare* (Department of the Army 2013), mention the use of social media throughout different stages and levels of planning operations. FM 3-53 only vaguely discusses social media use at the strategic level, most likely due to the current authorities that greatly restrict its use. ATP 3-05.1, while addressing similar information dissemination relevant to social media use, goes to greater lengths in exploring characteristics and employment. It addresses rumor containment, civil disturbance incitement, and disruption efforts, all of which can be integral pieces of a successful UW campaign. What it does not include is a discussion of why and how this potential and relevance exist. The inclusion of social media at all in ATP 3-05.1 may be a result of the efforts of then-Lieutenant Colonel Brian Petit, who in 2012 explored social media in UW for the first time. It is worth noting that even as late as 2011, Training Circulation (TC) 18-01, *Special Forces Unconventional Warfare* (Department of the Army 2011) failed to address any social media employment in UW operations.

Petit's article argues for the acceptance and integration of social media in UW operations. This idea arises largely from the Arab Spring, but also draws from other political movements such as campaigning and protesting. Aligning the emergence and dominance of social media on the world stage with UW, he proceeds to analyze three aspects of potential cohesion. The first is social mobilization that extends beyond

political borders and offers the potential to conduct UW campaigns on two fronts, the digital and the physical, in a decentralized and ideally anonymous environment. This mobilization can also enhance traditional UW goals of organizing, recruiting, and communicating with indigenous forces (Petit 2012).

Petit next examines the decentralized underground. Traditionally, an insurgent or guerrilla force's underground centers around the core leadership, from which action is planned and directed. He explains, "the proliferation of social media has introduced a new type of underground: a digitally connected, leaderless organization with varying levels of commitment to the cause" (Petit 2012, 25). This decentralized underground is less vulnerable to attack due to its ability to further decentralize, mutate, and reform when appropriate. "Remarkably, these self-forming digital undergrounds perform the exact functions of a traditionally organized underground: intelligence, counterintelligence, subversion, propaganda, control of networks and direction of tactical actions" (Petit 2012, 26). What a digital underground adds is "redundancy, distributed leadership and the ability to survive by mutation" (Petit 2012, 26).

The final aspect he calls the "weapon of the narrative." He explains that "electronic narratives are so pervasive that they generate actions before ideologies are considered" (Petit 2012, 26). The speed and depth with which social media have the power to distribute narratives are new factors to consider for UW, which can either assist or hinder operations. He also addresses the important psychological aspects of social media, not just for overthrowing a regime, but potentially for "creating a second front, supporting a deception operation, pressuring for peace or discrediting a regime's ability to provide security" (Petit 2012, 27). It bears noting, however, that even though Petit

gives significant discussion regarding the importance and possible employment of the psychological aspects of social media in UW, the SOF branch whose primary responsibility lies in shaping and manipulating the psychological front, MISO, is not mentioned.

Even though the article was met with mixed reviews within the blog of Small Wars Council (part of *Small Wars Journal*), Petit succeeded in opening the discussion of incorporating social media into UW. The most common critiques questioned the level to which social media inclusion is realistic. First, authorities need to be modified to allow such a decentralized use of the Internet, a process that any military member knows is slow at best. In addition, there is some question as to the level of language proficiency and technological proficiency required for any soldier to be a successful social media influencer on the battlefield (Small Wars Council 2012).

Major Michael Yeager argues that the root causes of successful Arab Spring political movements included the use of social mobilization and nonviolent collective action. However, he asserts that “it is only mere speculation at this point to the actual role and utility of social websites for revolution and resistance” (Yeager 2012, 1). In drawing parallels with past and present social movements and revolutions, he further points out that “many emerged and achieved success without the luxury of modern media and communications technologies let alone the Internet and social media” (Yeager 2012, 1). Yeager’s work reminds us of the dangers of overemphasizing the role of social media when analyzing recent political upheaval. A multiplicity of causal factors always exists. However, an equally erroneous assumption is under-emphasizing its role.

Besides these few examples of discussion on social media within the military, it is surprising that more broadly DOD-centric sources have not done similar exploration. The same year of the political upheaval of the Arab Spring, Task Force 2011 published “Countering Al-Qaeda’s Strategy: Re-Assessing U.S. Policy Ten Years After 9/11.” The report discusses the online activity of Al-Qaeda and other extremist groups through chat rooms and several organizational propaganda websites that no government has been successful in permanently shutting down. Although the use of social media is a well known and important conduit for Al-Qaeda to recruit, organize, communicate, and exploit successes, social media itself is only mentioned once in the report as a medium to recruit Muslim youth (Task Force 2011, 33). While recognizing the significance of this problem, Task Force 2011 concludes that the U.S. lacks the legitimacy for the creation of a successful online counter-message.

The recommendations for addressing this problem of online extremism in the report are broad and nonspecific. “Through continued regulation of online activity, increased coordination between governments, and heightened efforts at creating a global counter-message, the United States can make steps towards containing the spread of online extremist activity and thereby better control al-Qaeda’s propaganda, recruitment, training, and communication capacity” (Task Force 2011, 39). No direct recommendation specifying social media exists in the report, only generalizations that combine social media with all online extremist activity.

The same year, the Air Force published a white paper titled “Countering Violent Extremism: Scientific Strategies and Methods” which consists of a compilation of essays. Similarly to Task Force 2011, most of the essays in which social media is addressed

combine it with all Internet and digital devices accompanied with broad and nonspecific recommendations. Only one essay highlights social media specifically (Lemieux and Nill 2011) as an extremely effective way of transporting jihadist music around the world, which in turn correlates to the spread of extremist ideology. The essay leaves us, however, with no recommendations in terms of addressing this threat beyond continuing to monitor the situation.

A 2012 report from West Point titled “Edges of Radicalization: Ideas, Individuals and Networks in Violent Extremism” (Helfstein 2012) focuses exclusively on the social networks of violent extremists. The report recognizes the important role of social media in enhancing these extremist networks. “Social media offers prospective radicals an opportunity to develop social ties and find validation through others, thus providing the critical element of social interaction at relatively low cost” (Helfstein 2012, 4). Besides this mention, however, there is again little offered as a solution due to this usage being relatively new and unknown. This, along with one or two other mentions of social media being used to create and strengthen ties among violent extremists, remains the only specific citing throughout the report.

Two other publications deserve attention as sources in which I expected to find meaningful discussion on social media, but was disappointed. The National Intelligence Council’s “Global Trends 2030: Alternative Worlds” only mentions social media as an emerging market factor in increasing the power of Muslim Women (National Intelligence Council 2012, 32). In addition, the 2011 “Influencing Violent Extremist Organizations Pilot Effort: Focus on Al-Qaeda in the Arabian Peninsula (AQAP)” (Office of the Secretary of Defense 2011) only made tangential mention of social media being used by

violent extremist organizations. Throughout the rest of the Defense Department's unrestricted work on strategic communication and inform and influence capabilities, no other significant mention of social media appears.

Thus, we see that the military has only started the discussion on social media use in operations in the last two years. Doctrine has only vaguely addressed it this year, limiting it to strategic use, and the rest of DOD has almost entirely neglected a meaningful discussion of social media in any offensive capacity. I first intend to fill the gap that exists in military writings by showing why social media has emerged as such an important factor on the world stage. This provides a contextual understanding that will be central to appropriate social media employment. I then attempt to provide concrete and tactical ways that social media can be used by MISO to enhance UW, which is the mission best suited for social media employment.

The next chapter discusses the methodology used in this course of research. I begin by defining abductive reasoning and providing a brief discussion of how I apply it to my research question. I then address the way in which I structure this research and mention some of the primary works that contain the most relevance for this thesis. Finally, I discuss my new framework for social/political action and apply this framework to UW in order to examine different ways that social media can enhance military operations.

## CHAPTER 3

### RESEARCH METHODOLOGY

The primary question that my research centers on is: what role might social media play in proxy and actual military campaigns? As discussed in the previous chapter, the only doctrine containing any useful guidance on this question appears in FM 3-53 and ATP 3-05.1. These publications, however, contain only vague references that bring to mind the image of a commander telling a subordinate to “go do social media!” even though neither understand what this really means or how to constructively go about using such a capability. An adequate exploration into this necessitates an analysis on why social media has emerged as such a significant factor. What about its nature has changed or amplified changes in the world today?

In order to address the primary research question, I apply abductive reasoning. Craig Parsons explains this process as “some logical deductive moves and plausible inductive readings of a great deal of scholarship converge . . . as the most useful basic map of our explanatory options” (Parsons 2007, 22). As opposed to induction or deduction, the use of abduction accepts a chaotic reality as it exists and combines several relevant theories or variables to help explain it. Ian Shapiro describes this process as, “abduction or ‘inference to the best explanation’—reasoning on the basis of mature theories from observed effects to unobservable causes. Abduction to unobservables is a way of generating knowledge in which theory plays a vital role, and the empiricist-realist debate turn on their epistemic legitimacy” (Shapiro 2005, 39-40). The first step in this process involves gathering data on recent social and political movements and analyzing whether or not social media actually does play a significant factor in them. Although



dissenting opinions exist as to whether or not to regard social media as a causal factor, or even as a factor at all, the great majority of analyses view social media as a significant movement-enhancing agent. These findings are summarized in chapter 4.

I next undertake to determine why social media has emerged in resistance movements with such prominence. This process involves analyzing scholarly work on the effects that social media has had on the world stage and its actors, exploring what Craig Parsons calls the structural environment. To describe the structural environment, he states that “understanding structure is the whole task of those interested in explaining action. This also reflects how we use the verb *to structure*: ‘to construct, form, or organize’ in any way. Structure is everything that gives shape to human action” (Parsons 2007, 49).

The nature of this research necessitates the gathering of the most recent scholarship that analyzes these structural effects. I then subdivide my findings into effects on the concept of the individual and the nature of collective activity among organizations and networks. Although many scholars are included in this analysis, I focus primarily on several of the most recent and relevant works. Each of these works complements the others and adds a new dimension or characteristic to the structural landscape. The effect of social media on the individual is the subject of the second section. Section three goes on to discuss groups, individuals, and network characteristics. By mapping these characteristics and overlaying them onto each other I construct a new framework for social and political action today that not only illustrates the emerging complexities involved in modern movements but also the importance of considering these variables when planning and conducting military operations. I present and describe this framework

in section four, compare it to the traditional framework for social/political action, and discuss its relevance.

The most applicable mission in which to apply this new framework is UW, given its characteristic of fomenting political dissent as an underground resistance movement to achieve political goals and possibly regime change. I proceed to combine my framework with UW through what Howard and Hussain consider the successful phases of Arab Spring movements, sprinkled with further scholarship to extract some significant ways in which social media can have a profound effect on mission outcome. I include in this analysis the applicability of social media in the informal notion of phase zero planning. This helps determine how social media may be employed to enhance or ignite those characteristics discovered in my studies, which are not addressed or only partially addressed in existing doctrine. Each phase of UW contains opportunities ripe for exploitation through careful and orchestrated social media employment. As MISO retains the expertise within SOF on media use as well as psychological factors and effects, I show logically that social media employment should be conducted as part of an integrated MISO approach to supporting UW and potentially across the full spectrum of unified action.

The next chapter begins with a brief chronological summary of some of the significant social media-enhanced movements of the 21st century. It also draws out some of the diverse techniques that have been used, avoiding the bias of over-emphasized relevance or over-enhanced contribution to a movement's success. The following section discusses scholarly views on how social and digital media alters individuals' ideas of themselves and their ties to others. The third section combines scholarly works to show

the increasing complexities of what we traditionally understood as organizations and networks, and the effects on a more complex collective action process. I then present and discuss my new framework, and conclude chapter 4 by applying this framework to UW in order to extract more proliferative ways in which social media might enhance this mission.

## CHAPTER 4

### ANALYSIS

Scholars debate when the first true example of social media spurring political action with tangible outcome occurred. The following section does not enter into this debate, but rather provides a brief potpourri of such action and the outcomes that were likely produced or amplified through the employment of social media. I include a discussion of counter-arguments on its relevance as well. I then draw from scholarship to present ideas on the effects of the digital age on the significant actors involved with social/political resistance: individuals and groups of individuals. This analysis produces a new framework which applies to social and political action in the world today. The final two sections of this chapter apply this framework to UW in order to illuminate some techniques and targets of social media employment throughout a UW campaign.

#### The Rise of Social Media Usage

To understand the forerunners of social media-enhanced political movements, we must first look at what Spanish sociologist Manuel Castells calls “the first informational guerrilla movement” (Castells 2004, 82), referring to the Zapatista movement in the Chiapas region of Mexico that began in 1994. The implementation of the North American Free Trade Agreement (NAFTA) in Mexico in 1994 gave corporations the impetus and legal grounding to place their needs above democracy, individuals, and certainly the indigenous people. As the people of Chiapas saw their communal land taken by private interests, the Zapatista movement, or *Ejercito Zapatista de Liberacion Nacional* (EZLN), formed. Initial attempts at armed resistance proved futile, so EZLN moved its

campaign to the Internet (Hands 2011, 143-144). The result: “The Zapatistas’ ability to communicate with the world, and with Mexican society, and capture the imagination of people and intellectuals, propelled a local, weak insurgent group to the forefront of world politics” (Castells 2004, 83). Although social media and Web 2.0 had not yet emerged, EZLN succeeded in using the Internet to enhance its embryonic movement and gain enough support nationally and internationally to continue to fight for its political goals.

The next important technological development along the path to social media-driven political activism was short message service (SMS) text messaging. Organizers of the 2004 Orange Revolution in Ukraine relied heavily on this platform to organize and coordinate the nation-wide protests against the fraudulently elected government. The protests resulted in new and legitimate elections which brought opposition leader Viktor Yushchenko to power (Cullen 2010, 50). In addition, in Xiamen, China, 2007, text messaging was responsible for the mobilization of over one million protestors who organized and took to the streets to protest the construction of a dangerous chemical plant. Their efforts resulted in the government halting the project indefinitely (Cullen 2010, 50). These examples illustrate how digital tools have been effective even under regimes that are able to choke off mainstream media outlets that they fear may be a threat to their omnipresence.

Following the popular explosion of Facebook in 2005, a page appeared called “Support the Monk’s Protest in Burma.” Although this page originated outside Burma, it gained rapid popularity and quickly brought the oppressive military regime, under which Burma had suffered since 1962, to the forefront of the international community. When protests erupted in 2007, Burmese citizens were able to export pictures and videos of the

atrocities being committed by the government to the British Broadcasting Corporation (BBC) in what some news agencies dubbed the Saffron Revolution. The international community largely reacted with condemnation, sanctions, and pressure for an end to the violence and the beginning of a democratization process. In the short term, the ruling military junta was able to shut off digital communication, including cell phones, with the rest of the world (Scholz 2010, 27). However, in 2010, Burma adopted a new constitution and then saw the first democratic elections and parliamentary by-elections in 2012. Even though many international observers declared the elections fraudulent, they resulted in the international community lifting some of the sanctions and giving hesitant praise for the act of holding elections. Some skeptics may discard a direct link between the Facebook page “Support the Monk’s Protest in Burma” and the democratic changes that occurred later, but the international community’s reaction to the 2007 and subsequent protests likely contributed to the steps towards democratization.

In the 2008-9 Israel-Gaza conflict, the importance of social media increased as it became the only source of information. In an attempt to keep potential atrocities out of the world’s eyes the Israeli government banned all journalists from the Gaza Strip for the duration of the conflict. This action unintentionally pushed Palestinians, Israelis, and onlookers throughout the world to pass information and hold discussions using a variety of social media. Israelis and Palestinians created Facebook pages to post updates on rocket attacks and atrocities, as well as to hold discussions. Both sides also used Twitter extensively to pass information, and Wikipedia hosted a hot debate on the conflict. Even the Israeli Defense Forces created a YouTube channel to tell the story of the conflict from

the Israeli soldiers' perspectives (Scholz 2010, 29). In the absence of traditional media, social media filled the void of discussion and information-sharing.

Twitter played the lead role in Moldova's aptly dubbed "Twitter Revolution" or Grape Revolution, following the 2009 parliamentary elections. Opposition groups claimed that the elections were fraudulent and demanded a recount of votes, new elections, or the resignation of the majority-led Communist Party government. Massive protests organized by Twitter and Facebook broke out across the major cities in Moldova, which included the sacking of the parliamentary building in the capital. Despite accusations of violent crackdowns, arrests, and torture used by the government, the Communist Party ultimately lost the majority in the parliament (Shirky 2011, 2).

The protests in Spain, 2011, by *los indignados* (the indignant) illustrates the level to which a social media campaign worked to organize nationwide protests (Bennett and Segerberg 2013; Gerbaudo 2012). This movement manifested physically in the May 15, 2011, protests (referred to popularly as the 15-M Movement) that occurred simultaneously in urban centers across the country. The spark that ignited these protests arose from the Internet-based social movement *¡Democracia real YA!* (Real Democracy NOW!), which started its campaign in January, 2011. This movement sought to mobilize the Spanish youth, of whom 41 percent were unemployed, towards political change (Charnock, Purcell, and Ribera-Fumaz 2012, 4). As the website Open Democracy reported, "according to one Spanish RTVE poll, up to 7 million participated in some way, 20 percent of the population, and it had over 70 percent approval" (Bennett 2011). Even though scholars may question the effectiveness of the movement as far as achieving its economic and political goals (Charnock, Purcell, and Ribera-Fumaz 2012) the

prominence of social media in organizing and coordinating the movement's protests was significant.

Perhaps the most famous example of social media-enhanced political action came from the Arab Spring of 2011, which saw protests across the Middle East and North Africa and resulted in some significant political changes. The snowball that started the avalanche arose in Tunisia with the self-immolation in December, 2010, of Mohamed Bouazizi, an insignificant street vendor who became tired of a corrupt and debilitating bureaucracy. Even though state news agencies did not report the incident, social media connected people all over the country using blogs, texts, and YouTube uploads (Howard and Hussain 2013, 18-19). By early January 2011, these digital networks of support and solidarity had spread across North Africa and parts of the Middle East. On January 14, the Tunisian ruler Ben Ali, who had been in power for 24 years, fled the country. The protests in Tunisia further resulted in the ouster of the prime minister, the disintegration of the ruling party, and democratic elections.

Perhaps the most famous results of the Arab Spring were seen in Egypt. The high level of online activity in Egypt (as in Tunisia) made social media a primary contributor for gaining initial awareness and support in the call for political change. Some scholars credit the initial spark to the death of Khaled Said, a young activist and blogger who was beaten to death by police (Gerbaudo 2012; Howard and Hussain 2013). Wael Ghonim, a young Google executive, started the Facebook page "We are all Khaled Said" as a forum to discuss government corruption and abuses of power. This page, along with similar pages created in honor of Khaled Said and supporting opposition leader ElBaradei, exploded in popularity very quickly.



Kurt Weyland, however, rejects these social media outlets as relevant to the political action that followed. He states that “Egyptian activists tried to use the brutal police killing of a critic of official corruption, Khaled Said, as a rallying point for mobilizing large scale protests, but with very meager success. Only the downfall of Tunisia’s autocrat provided the—totally unexpected—impulse for the uprising of early 2011” (Weyland 2012, 919). He proceeds to argue that the revolutions of 1848 spread just as quickly through the Middle East and North Africa, long before digital media. However, the fact that before the mass protests began Ghonim’s page and other Khaled Said pages had accrued almost 500,000 viewers and ElBaradei’s page had over 100,000 (Ghonim 2012; Howard and Hussain 2013), with Ghonim’s page alone attracting 36,000 users on the first day of its creation (Gerbaudo 2012, 114), indicates that social media certainly played a role in spreading awareness and coordinating the early protests. Even if the confidence to increase the intensity of the collective action came from the Tunisian success, the initial role that social media played should not be overlooked. As one Egyptian activist said, “we use Facebook to schedule the protests, Twitter to coordinate, and YouTube to tell the world” (Callen 2012, 11).

David Faris agrees with Weyland that “We are all Khaled Said” and similar pages do not account for the origin of dissent in Egypt. In contrast to Weyland’s dismissal of the role of social media, he argues that the success of the Egyptian movement should be credited to digital activism in Egypt in the decade preceding 2011. He states, “The work of these earlier blogger-activists was pioneering in the sense that it helped transform public debate about a number of issues that became focal points during the Egyptian revolution itself” (Faris 2013, 22). In addition, Joseph Bock points out in *The Technology*

*of Nonviolence: Social Media and Violence Prevention* (2012) that besides social media's role in spreading awareness and coordinating activist activities, social media played an important role in preventing violence from protesters in early stages and limiting it as rallies intensified.

The political action in Egypt resulted in the ouster of President Mubarak and two prime ministers, as well as the dissolution of parliament, the state security services, and the ruling party (Howard and Hussain 2013, 9). Most people see these two countries, Egypt and Tunisia, as the greatest successes of the Arab Spring uprisings. This notoriety is most likely due to the fact that both movements resulted in the ouster of long-standing and relatively well-known dictators. It is, however, important not to discount the political victories of several other countries in the region. While not as digitally connected, rulers in Algeria, Bahrain, Saudi Arabia, Syria, and Libya immediately tried to curtail social media use within their countries as they saw the fates of Ben Ali and Mubarak. Success levels varied. "Facebook provided an invaluable logistical infrastructure for the initial stages of protest in each country. Text-messaging systems fed people in and outside these countries with information about where the action was, where the abuses were, and what the next steps would be" (Howard and Hussain 2013, 23).

Political victories occurred in each of the countries mentioned above, though activists paid more dearly for these victories in some countries over others. In Algeria, violence was minimal, but the 12-year ruler Bouteflika lifted the country's 20-year state of emergency in a successful attempt to placate protesters. Bahrain's Khalifa violently suppressed activists, but simultaneously increased social spending by over \$2500 per household. The Al Saud ruler of Saudi Arabia saw over six times more online activism

than offline, and raised public spending by over \$90 billion while also agreeing to allow women to vote for the first time in the 2015 municipal elections. Al-Assad in Syria approached the protests much like Khalifa with violent repression, but also abolished the unpopular supreme court, cut taxes, and offered citizenship to the Kurds. Nonetheless, civil war continues in Syria despite these attempts. Finally, in Libya, although social media action was minimal throughout the fighting, political action resulted in the overthrow and killing of the 42-year dictator Moammar Gaddafi (Howard and Hussain 2013, 8-9).

Besides inciting political change, social media enhanced the popular social and economic movement of Occupy Wall Street, in which protestors sought to combat the perceived greed, corruption, inequality, and mismanagement of America's financial institutions. Activists occupied Zuccotti Park in the New York Wall Street financial district on September 17, 2011, and rallied behind the slogan, "We are the 99%." In contrast to the movements of the Arab Spring, however, attempts to spread the word of the protests and gain support through social media use were largely unsuccessful until the movement's physical manifestation on September 17 (Gerbaudo 2012; Bimber, Flanagin, and Stohl 2012). Kalle Lasn, an early organizer of the movement and part of the Canadian magazine *Adbusters*, created a Facebook page and Twitter feed several months before the protests began, but neither received much attention. Bimber, Flanagin, and Stohl traced the number of likes on the Occupy Wall Street Facebook page in the week leading up to and following the protests. On September 17, the page had only 891 likes. The next day that number rose to 2,174 (an increase of almost 250 percent) and by September 24 the number of likes rose to 13,585 (an increase of over 1,500 percent)

(Bimber, Flanagin, and Stohl 2012, 115). Within a month, the Occupy Wall Street protests spread “from New York to more than 80 countries and 900 cities around the world” (Bimber, Flanagin, and Stohl 2012, 41) and became heavily followed on Facebook, Twitter, and Tumblr. Thus, although social media did not succeed in the initial preparation of the movement, it significantly amplified the effects.

Another key arena for the emergence of social media lies in political campaigns. Today, no politician conducts a political campaign or movement in the U.S. without incorporating various social media platforms such as Twitter, Facebook, and blog sites. The pioneer of this social media usage was the Barrack Obama campaign of 2008. David Plouffe ran the Obama campaign and was able to leverage emails, text messages, Twitter feeds, and a popular Facebook page. This strategy gave to an impressively extensive network of grassroots organizers the image and forum that they needed to win. As Plouffe reflected later, his campaign achieved “a scale that we could not have imagined in our wildest dreams: 13 million people, 4 million contributors, 6 million volunteers. Think about that. Thirteen million people are on our e-mail list; that was 20 percent of the people who voted for Barrack Obama” (Gerbaudo 2012, 115).

During the same campaign, Michelle Bachmann outraged Obama supporters by suggesting that some of his ties to more radical left-wing groups and individuals may cause some of his views to be considered anti-American. A group of left-wing online activists within the DailyKos blogging community responded by attempting to sabotage Bachmann’s own congressional reelection campaign by raising funds for her opponent through a created Tinklenberg donation site. The site raised over \$840,000 in less than

two days, and even though Bachmann won her campaign the margin was considerably narrower than expected (Karpf 2010, 159-160).

At the risk of focusing solely on movements that social media has enhanced, there are certainly instances of failed political mobilizations that have integrated social media as part of their campaigns. In Belarus, following the allegedly rigged 2006 re-election of Aleksandr Lukashenko, protesters organized using Facebook and blog sites. The government responded with a violent repression of the opposition, which ultimately resulted in fewer Internet freedoms and the permanent blocking of many social media platforms. A similar crackdown occurred in Iran when the Green Movement organized to protest what they claimed to be the fraudulent election of Mir Hossein Mousavi in 2009. Despite the extensive use of social media to organize and coordinate efforts (Glaisyer 2010, 88), the government responded with a brutal crackdown and further curtailing of Internet access. The Thai government responded even more rapidly in 2010 to the Red Shirt Uprising, which also relied heavily on the use of social media to organize protestors, immediately dissolving crowds and killing dozens (Shirky 2011, 3).

Besides these failed social-media-enhanced movements, it certainly bears mentioning that social media has also been used by individuals and governments to curtail the rights and freedoms of others. Several scholars (Morozov 2011; Koesal and Bunce 2013; Callen 2012) argue that some authoritarian regimes have learned to use social media as a tool for surveillance, sophisticated censorship, and propaganda. Technological skeptic Evgeny Morozov in the *Net Delusion* explores how several former Soviet Republics, China, and Iran, have used social media and the illusion of Internet freedoms to identify dissidents and activists and to further connect them to western-

backed funders. He posits that these platforms have an inherent “democracy-squashing quality” (Morozov 2011, 81) that encourages authoritarian regimes to hold on to power. Patrick Callen calls this the “fundamental flaw in the use of social media for protest” (Callen 2012, 19).

Along similar lines, Koesal and Bunce explore the methods used by China and Russia to weather the storms of two waves of democratic movements that replaced many authoritarian rulers: the Color Revolutions (primarily in the former Soviet Republics) and the Arab Spring. As the Arab Spring relied more heavily on social media to spread awareness and gather support, Russia and China tailored their defenses accordingly. China responded by heavily curtailing access to social media sites where information about the uprisings existed, including a ban on Facebook, Twitter, and YouTube. They simultaneously deployed their own bloggers to begin a grassroots campaign to encourage the Chinese people to help defend their country against “hostile external sources” (Koesal and Bunce 2013, 759). It is worth noting that even though this attempt was successful China has historically had several examples of activists circumnavigating the government’s restrictions on social media sites (Scholz 2010, 26). Russia responded in a more subtle way, due to its less restricted Internet access, but similarly to China which was focused heavily on campaigns portraying the uprisings in a negative and Western imperialistic fashion.

Daniel Trottier points out that not only authoritarian regimes use social media to police their own people. In the 2011 Vancouver riot following the Stanley Cup playoffs, police were able to identify and arrest many of the rioters as a result of citizens posting pictures and videos to social media sites. Some of the citizens were doing so in outrage of

the riot and with the expressed intent of helping police identify lawbreakers. Others, ironically, were actively participating in the riots and posting photos and videos to brag about their participation. Some online citizens were able to identify rioters and responded by providing information on those that they recognized to police, as well as publically shaming them using their own social media platforms (Trottier 2012).

Besides being used for internal policing by authoritarian regimes and democracies, terrorist organizations have embraced the use of social media as well. As Rothenberger states:

Social media offer the possibility of reaching a wide audience in all parts of the world, and of networking and establishing contacts—an essential part of PR efforts. They can play a crucial role for the groups' self-organization as they offer anonymous interchange and volatility. The terrorists can also use it as a propaganda tool to distribute their ideas of political change. (Rothenberger 2012, 10)

She goes on to trace social media use among terrorist organizations around the world.

*Euskadi Ta Askatasuna* (ETA) in Spain uses Facebook to promote Basque nationalism and foment dissent through intimidation and exploitation of past successes. The Free Aceh Movement in Indonesia uses their Facebook page in a similar fashion. *Fuerzas Armadas Revolucionarias de Colombia* (FARC) in Columbia uploads videos and propaganda regularly, and similar videos of the Irish Republican Army (IRA) ideologies and exploits appear throughout YouTube. Shining Path of Peru uses Twitter as well as Facebook among their recruitment and propaganda repertoire. Finally, and most famously, "Al Qaeda makes extensive use of all Internet and especially social media features; in fact, their existence is almost limited to a 'virtual network.' Al Qaeda (and their media production company as Sahab) benefit from the technological convergence

that the Internet allows in that everyone can become a TV producer” (Rothenberger 2012, 18).

Another way that social media use has emerged to violate or curtail individual rights appears in the rise of online vigilantism. One such example occurred during the famous trial of George Zimmerman. After his alleged shooting of Trayvon Martin, some celebrities made a surprising attempt at online vigilantism. Following the incident in 2012 and long before the 2013 verdict had been reached, Spike Lee tweeted an erroneous address for the Zimmerman family to his followers. The address belonged to an elderly couple who were completely unrelated to the George Zimmerman on trial yet forced them to flee their home in fear. Later, Roseanne Barr tweeted the correct address to Zimmerman’s parents’ house. She removed the tweet after a brief time, however, and tweeted “At first I thought it was good to let ppl know that no one can hide anymore” (Rosenberg 2012). Similar instances of social media vigilantism have appeared all over the world.

This section has provided a consolidated and selective account of the rise of social media usage in political and social movements across the world. So why is it that such a prominence has emerged? The next section explores what it is about the nature of social media that makes it so conducive to and successful for such movements. In addition, it analyzes other changes in the structural landscape of the world that have occurred as a result: namely a change in our idea of the individual, as well as organizations and networks.



### Characteristics of Social Media: Effects on the Individual

What is it about social media that gives it the ability to enhance social and political movements in such a profound way? One key aspect is its effect on the individual and the idea of the individual. This section does not argue that social media usage has fundamentally changed human nature itself, but has perhaps assisted or accelerated certain trends that began emerging over the last century. I argue here that several aspects of social media's effect on individuals, and even the idea of individuals, have induced an environment increasingly conducive to digitally-enhanced collective action.

The idea of increased individualization in society is hardly new, but scholars like Clay Shirky believe that social media has changed us in radical ways. A professor at New York University, he has written *Here Comes Everybody: The Power of Organizing Without Organizations* and *Cognitive Surplus: Creativity and Generosity in a Connected Age*. As an authority on the sociology of the Internet, he contends that social media is radically changing not just the way that people communicate, but how social groups are formed and can then affect change. Fundamentally, Web 2.0 (coined in 1999 by Darci DiNucci) has altered the way we organize, share information, and even think (Shirky 2008). As stated in one of the reviews of his book, "Shirky expresses that this massive amount of user-generated knowledge, non-dependant on institutions, and much less managed by anyone, is not only flooding the Internet with useless thoughts, but actually creating some of the most important innovations we have today" (The World in Conflict 2011). In another review, "not only do collaborative tools enable people to communicate with whom they want when they want, they allow them to circumnavigate established

power structures and media outlets, creating grass roots-driven networks that become so powerful they can solve crimes and topple governments” (Innes 2011).

In a 2012 interview with National Public Radio, Shirky describes the three ways in which the Internet and social media have changed society. The first way is by changing the nature of informational interaction. “Whereas the phone gave us the one-to-one pattern and television, radio, magazines and books gave us the one-to-many pattern, the Internet gives us the many-to-many pattern” (NRP/TED Staff 2012). The second way is that the Internet has absorbed all other traditional information-sharing mediums. “As all media gets digitized, the Internet also becomes the motive carriage for all other media” (NRP/TED Staff 2012). This change leads to his third factor, that consumers are now also producers. “Every time a new consumer joins this media landscape, a new producer joins as well, because the same equipment—phones, computers—let you produce and consume” (NRP/TED Staff 2012). His claims draw on examples ranging from recent political activity within the U.S. to the Arab Spring.

Despite Shirky’s widely accepted celebrity among digital experts as a leading Internet sociologist, both his books and his reviews have been subject to criticism. This criticism often claims that his books represent more of a thesis-free digression of examples than a scholarly path towards uncovering truth. As one critique writes, Shirky’s works are “a collection of ideas rather than a thesis by itself. Shirky uses a large number of fragmented examples to prove often distant principles of what he considers to be changing in human behavior, but rarely states in fact what is changing” (The World in Conflict 2011). Further, “Shirky’s analysis is too often abstruse and scattershot. He . . .

muddies his points with needless digressions on the follies of institutions still stuck in the pre-digital world, which feels like shooting fish in a barrel” (Manjoo 2010).

Others cite Shirky’s almost fanatical optimism on the benefits of social media and the digital age as leaving his ideas one-dimensional. “Shirky misses how massive companies are using these same principles [that enhanced the power of people to organize] to build and consolidate their institutions” (The World in Conflict 2011). “Shirky seems to be telling just half the story. Nearly every one of his examples of online collectivism is positive; everyone here seems to be using the Internet to do good things” (Manjoo 2010). Still other critiques question his claims as an overstatement of the effects of social media on human behavior. “Whether humanity will really be changed by the new media is another matter . . . we will still suffer loss or heartbreak or experience joy irrespective of whether we are on Facebook or not. The fundamentals do not go away” (Lezard 2011). These critiques provide valuable caution not to overstate or overestimate the effect of social media on individuals.

However optimistic Shirky’s view of the effect of social media on the individual may be, the rise of digitally-enhanced individualism is also supported by more recent scholarly work (Bennett and Segerberg 2013). In addition, individual empowerment through the breakdown of traditional information consuming and producing lines bears exploring. Bimber, Flanagin, and Stohl concur that “digital media use does, however, signal a great deal of potential variation in what people can do, and therefore a greater role for choice, interest, and motivation” (Bimber, Flanagin, and Stohl 2012, 19). This increase in the amount of available outlets at an individual’s disposal to make his or her voice heard has the potential not just to enhance the depth of penetration of a message or

emotion, but widen the scope and vastly decrease the time of dissemination. According to Mergel, social media applications see such a high degree of success because they support the basic needs of human social networking. He states that “people have the need not only to share success stories but also to report negative events in order to receive emotional support” (Mergel 2013, 46). This need, combined with the high technologically capable society, encourages widespread social media use. “Part of the current success of tools such as Twitter and Facebook can be attributed not only to the psychological traits that support the use of social media applications, but also to a relatively high degree of technological literacy—that is, *slack capacity* within a society for using social media applications for private purposes” (Mergel 2013, 46).

Joss Hands explores this theme in *@ is for Activism: Dissent, Resistance and Rebellion in a Digital Culture* (2011). He argues that “there lies at the heart of rebellion a kind of thinking that entails the mutual recognition of others, and of solidarity and openness” (Hands 2011, 17). In his discussion of the “recognition of other” and “solidarity,” Hands draws from Albert Camus’s *the Rebel* (1953) in which rebellion is described as “always involving an awakening of consciousness” (Hands 2011, 9). He warns, however, to “see that careful thought be given to where, and in what form, power should be exercised, to allay the risk that rebellion turns into oppression, and ‘no’ into a command, not a response” (Hands 2011, 9).

Hands compares Camus’s idea of the “no” with John Holloway’s concept of “the scream” in *Change the World without Taking Power* (2002). “The scream is negative, a reaction against, the *no* of which Camus speaks” (Hands 2011, 7). Holloway describes it as “rejection of a world that we feel to be wrong, negation of a world we feel to be

negative” (Holloway 2002, 2). Ultimately, it is this very scream or no, amplified through social media use, that spurred many of the political and social movements discussed in the previous section (i.e., Arab Spring). So given this individual empowerment and ability to push an idea or narrative quickly and extensively throughout the digital world, how does this affect people organizing?

One way is through a diminished connection between individuals, and between individuals and organizations, that several scholars have explored recently (Bennett and Segerberg 2013; Storck 2011). Storck argues that these weak ties are the basis of social media networks, and that within these weak ties lies considerable strength. To expand on this she references Granovetter’s “The Strength of Weak Ties,” in which he argues that these weak ties are actually stronger than strong ties. “The advantages of weak ties over strong ties lie in their ability to diffuse information and ideas across social groups” (Storck 2011, 18). In addition, Granovetter points out that “weak ties are more likely to link members of different small groups than are strong ones, which tend to be concentrated within particular groups” (Granovetter 1973, 1376). Storck uses this idea to argue that “by capitalizing on the weak ties forged online through social networks, such as Facebook and Twitter, the activists were able to not only circulate their calls for political mobilization, but began a dialogue that fostered the attitude for political activism in Egyptian communities” (Storck 2011, 18-19). She further points out that along with weak ties, the added characteristics of the “anonymity provided by the Internet, and the egalitarian nature of online communication” (Storck 2011, 17) explain how social media is roundly conducive to political action.

Bennett and Segerberg explore the idea of weak ties as well, with “citizens seeking more flexible association with causes, ideas, and political organizations” (Bennett and Segerberg 2013, 5). The result, “individuated citizens” (Bennett and Segerberg 2013, 6), has led to an increasingly important emergence of what they call “personal (as in easy-to-personalize) action frames” (Bennett and Segerberg 2013, 6) in contrast to more traditional scholarly focus on collective action frames. In addition, because of a growing trend of people disassociating themselves or more weakly associating themselves with institutions, institutions have been forced to respond by developing increasingly personalized messages and ideas to more effectively reach out to individuals, their lifestyles, and their social networks. What Bennett and Segerberg propose is effectively a reverse in participation due to the emergence of weak ties and individualization. Instead of individuals identifying themselves with organizations, organizations are increasingly having to identify themselves with individuals.

I have tried thus far in this section to illustrate some of the ways in which social media has modified or perhaps enhanced individuals and their own perception of self-importance. What does this mean, then, when we look at individual action in relation to organizations, particularly narrowing the focus to activism and dissent? Social media has affected this relationship as well, using weak ties and empowered individuals to enhance collective individual action within organizations.

Earl and Kimport explore the Internet’s ability to meliorate participation in political action by using what they call a “leveraged affordances” (Earl and Kimport 2011, 10) approach. They discuss two affordances that online participation offers as advantages over traditional participation. The first affordance is the reduced cost of

participation for the individual. The online activist can vary the level of commitment to an organization or cause. Individuals can simply monitor a movement, participate some of the time, or commit to a higher degree. Faris echoes this claim, stating that political action through social media platforms provides a greater degree of success “by lowering the ‘revolutionary thresholds’ of individuals embedded in social networks” (Faris 2013, 22).

The second affordance discussed by Earl and Kimport is “the ability to aggregate people’s individual actions into broader collective actions without requiring participants to be copresent in time and space” (Earl and Kimport 2011, 10). This affordance parallels Storck’s earlier statement regarding the higher degree of anonymity afforded by the Internet. The added advantage of not needing a meeting space includes easier participation of individuals, plus lowered costs of organizing on the part of the organization. These two affordances contribute to a rise of the “5-minute activist” (Earl and Kimport 2011, 73) and their ability to “supersize” participation (Earl and Kimport 2011, 104).

This alternative to public meeting space is also discussed by Gerbaudo, which he describes as “symbolic public space” (Gerbaudo 2012, 160). These spaces allow for enhanced emotional connections through an “emotional space.” He argues, however, that these alternative public spaces must also be enhanced by physical gatherings to be effective. Otherwise, activists run the risk of becoming isolated exclusively to the online world and therefore ineffective. In addition, although social media usage of alternative public space can and has greatly enhanced collective action, the weak tie characteristic of modern networks contains the increased risk of evanescence. This fleeting aspect can

result in short-term and quickly-dissolving movements that peak and dissolve before achieving any of their desired outcomes (Gerbaudo 2012, 159-162).

The dynamic of a shifting nature in personal connections is a key topic of discussion for psychologist Sherry Turkle. In her 2011 book *Alone Together: Why We Expect More from Technology and Less from Each Other*, she explores the effects of people's over-reliance on technology. She argues that this new weak tie offers merely the illusion of companionship, and that online communications lack the intimacy necessary to form meaningful connections with each other. She further argues that due to this online over-stimulation, people are beginning to lose their capacity for solitude. The loss of this capacity, in turn, psychologically inhibits a person's ability to form meaningful connections with others (Turkle 2011). Although somewhat grim, Turkle's work provides a meaningful complement to the authors mentioned above on the changing nature of the individual.

This section has explored some of the effects that the rise of social media has had on the individual. It has enhanced individualism and the idea of self-importance through the amplification of individual opinions, frustrations, and narratives. People connect through weaker ties to each other and to organizations. As scholars debate whether or not this new characteristic is a strength or weakness, the importance for this study is solely its existence as part of the structural landscape, which must be acknowledged and considered with regards to political intervention and action. The next section proceeds to explore the ways groups, organizations, and networks are evolving as a result of digital media and increased online interaction and communication.



### Characteristics of Social Media: Effects on Groups, Organizations, and Networks

One key development in scholarly work when looking at the role of the organization as compared to the role of the individual in a social or political movement is the shifting dichotomy between the two. Importance and prominence is increasingly becoming the domain of the individual in these movements over what traditionally belonged to organizations (Bennett and Segerberg 2012; Bennett and Segerberg 2013; Earl and Kimport 2011). This phenomenon has led strong digital media proponents like Shirky to dismiss the role of traditional organizations altogether as anachronistic and fading. However, these organizations are far from obsolete. Even though some may be struggling to adapt to compete with more informal organizations, many continue to flourish and are not showing signs of diminishing. “An unmistakable fact about the state of collective action at present is that formal collective action organizations are thriving, right alongside the profusion of organization-less forms of association that attract so much attention, as well as the many hybrid and mixed organizational forms and networks” (Bimber, Flanagin, and Stohl 2012, 8).

Bimber, Flanagin and Stohl argue that the greatest challenge of collective action today is not organizations, but organizing. Depending on specific goals and objectives, they show that these new organization-less organizations along with hybrid forms of organizations, which contain characteristics of both traditional organizations and modern organization-less organizations, often work side by side with traditional organizations to create a more desired outcome. One such example occurred in the wake of the 2010 earthquake in Haiti. Though the Red Cross led a large part of the relief effort, their efforts were complemented by countless appeals through individuals and informal groups on

FaceBook, Twitter, YouTube, and blogs. This combined campaign produced over \$35 million in the first two days including \$8 million by text messages (Bimber, Flanagan, and Stohl 2012, 7). Thus we see how the concept of an organization has been modified and complicated by social media.

The nature of organization-less organizations provides scholars with considerable material to explore. Initial perceptions and descriptions of these organizations, especially ones that incorporate social media as a means of mobilization, are being heavily challenged by more recent scholarship. Buzz-words like “network,” (Castells 1996; Castells 2000; Castells 2009) and “swarm” (Hardt and Negri 2000; Hardt and Negri 2005; Hardt and Negri 2009) were originally applied to descriptions of social media-organized groups and are replicated extensively throughout literature and discussion of digital and social media. Castells’ network contains no center, requires no central coordination, and contains the potential for spontaneity. The swarm, or multitude, of Hardt and Negri refers to the collective and decentralized voice without the need for physical location to be a part of its collective action. Although both descriptions or metaphors correctly integrate the notion of societal dispersion and decentralization into their descriptions, several modern scholars argue that they go too far (Gerbaudo 2012; Bimber, Flanagan, and Stohl 2012).

Bimber, Flanagan and Stohl do not concede that the entity created through online participation takes precedence over the individual, as Hardt and Negri describe with their swarm. What digital media does, they argue, is enhance individual agency. The groups that form as a result often lack traditional organizational command and a single identity or ideology (Bimber, Flanagan, and Stohl 2012, 3). However, the citizen continues to play

a large role in the network, particularly regarding “the core behavioral, attitudinal, and perceptual dimensions of individuals’ relation to collective action” (Bimber, Flanagin, and Stohl 2012, 11). Gerbaudo disputes the characteristic of leaderlessness, arguing that these networks have soft leaders, or “choreographers” (Gerbaudo 2012, 40). These choreographers do not see themselves as or have any desire to be leaders in the traditional sense, but nevertheless exist and contradict Castells’ notion of spontaneity (that groups spring into being on their own). Their creation of groups using online social media platforms is what Gerbaudo often refers to as “choreography of assembly” (Gerbaudo 2012, 12).

Gerbaudo goes on further to state that “despite their repeated claims to leaderlessness, contemporary social movements do have their own choreographers and these choreographers are not identical with the ‘dancers’ or participants” (Gerbaudo 2012, 159). He uses Wael Ghonim’s role in the Egyptian uprising, the *indignados* of Spain, and the efforts of *AdBusters* in the Occupy Wall Street movement to defend his claim. He also argues against Hardt and Negri’s idea on the lack of necessity for physical space. He contests instead that “social media use must be understood as complementing existing forms of face-to-face gatherings (rather than substituting for them), but also as a vehicle for the creation of new forms of proximity and face-to-face interaction” (Gerbaudo 2012, 13). This view is echoed by Faris who insists that social media networks cannot be a substitute for grassroots organizing, but can make the organizing easier and enhance its effects.

Having discussed the emerging complexity inherent in organizations today, I now move on to explore how networks are affected. As Bennett and Segerberg note,

traditional networks are composed of two or more traditional organizations working together towards a mutual goal. Today, following the scream or the no discussed earlier from Hands, a combination of networks can emerge that may include some or all of the following: individuals, formal organizations, organization-less organizations, and hybrid organizations. The way in which modern scholars like Hands and Gerbaudo describe the coming together of these elements evokes the ideas of political theorist William Connolly's *A World of Becoming*. Each element, be it an individual or an organization, is what he calls a "force field." "A force-field, roughly speaking, is any energized pattern in slow or rapid motion periodically displaying a capacity to morph, such as a climate system, biological evolution, a political economy, or human thinking" (Connolly 2011, 5). As these force fields draw together over a common goal and move towards a common end state, they emerge into a "political resonance machine." As Connolly describes:

A political resonance machine appropriate to the urgency of today will be composed of multiple constituencies from several subject positions—including class, race, age, gender, and religion—who seek to amplify gratitude for being in their own faiths and to fold that ethos into the way they address pressing issues of the day. It will apply internal and external pressure to several states, corporations, religious institutions, and international organizations at the same time. (Connolly 2011, 41-42)

Even though Connolly is not specifically describing social media networks, this notion of a political resonance machine fits beautifully with descriptions of some of the political movements previously covered in the beginning of this chapter. Hands describes this notion of emerging force fields in a similar way. As he phrases it, he seeks "to provide an operational concept for this process of mobilization—of coming together to act in direct, concrete and particular forms. This is the notion of the 'fused group'"

(Hands 2011, 131). Hands goes further in specifying one particular feature of a fused group that Connolly does not include as inherent in his resonance machine—dissolution.

Fused groups, however, do not last. Once the unifying threat diminishes, the imperative to fuse is lost. If it wishes to survive, the group must then seek other motives and structures to maintain itself—and here the danger arises of the group becoming frozen into a more permanent, conservative form... We can thus see technology as the ultimate worked matter—as a practico-inert field it is shaped by praxis, solidified, and then again contributes to new forms of seriality, and potentially towards new moments of praxis. (Hands 2011, 134)

We can therefore deduce that fused groups must inevitably disperse once their goals have been achieved, or seek to find another unifying cause to keep it together. This process, however, contains the risk of the network changing into something potentially and perversely different. It may also lose its inertia or momentum, which for Connolly would make it a force field no longer. Here, Hands gives credit to technology as the primary shaper and welder of fused groups while Connolly declines to make such a connection. Gerbaudo makes a similar description to both Connolly and Hands:

Contemporary protest culture is sustained by a narrative of *popular reunion*, which revolves around a re-composition or ‘fusion’ of individuals in a collective subject with majoritarian ambitions. In this context, social media have acted as a means of collective aggregation, facilitating the convergence of disparate individuals around common symbols and places, signifying their unity *despite* diversity. (Gerbaudo 2012, 14)

Thus we see Gerbaudo’s and Hands’ ideas of fusion closely aligned. Gerbaudo does mention the additional aspect of diversity of elements in his fusion, which may likely relate to Hands’ notion of the inevitable dissolution of fused groups following the conclusion of collective action. These new ideas of networks provide important context as we now explore some different types of networks and how they relate to and conduct collective action.

Bennett and Segerberg explore the idea of revisiting collective action to more comprehensively identify and incorporate the emergence and prominence of the new technologically-centric social networks. While recognizing the continued presence of traditional collective action conducted by formal organizational networks (in contrast to Shirky's claims), they draw out a new type of action that they call "connective action." The focus of their work is to explore this "digitally networked *connective action* that uses broadly inclusive, easily personalized action frames as a basis for technology-assisted networking" (Bennett and Segerberg 2013, 2). This idea of connective action centers on the characteristic of looser levels of coordination that are conducted by either individuals or organizations within networks. What follows is a description of Bennett and Segerberg's ideas of the three types of networks and their roles in conducting either collective action or their proposed connective action.

They first describe "organizationally brokered networks" (Bennett and Segerberg 2013, 46). This traditional network conducts collective action and is characterized by the high level of coordination conducted by an organization within the network, which also takes the lead in bridging any gaps that exist among diverse elements. Bennett and Segerberg further clarify, "these organizationally brokered networks may use digital media and social technologies primarily as a means of mobilizing and managing participation and coordinating goals rather than inviting personalized interpretations of problems of action" (Bennett and Segerberg 2013, 46). The example they provide of this type of network conducting collective action is the G20 London Summit protests.

Almost the opposite type of network described by Bennett and Segerberg is the "crowd-enabled network" (Bennett and Segerberg 2013, 47). This network relies on

connective action and is characterized by its small amount or complete lack of formal coordination or reliance on any organization. Here, “technologies become prominent organizational agents, and personal action frames overshadow collective action frames as the transmission units across social networks” (Bennett and Segerberg 2013, 46). It tends to be a loosely connected and technologically enabled group of individuals who may be repelled by the idea of participating through formal organizations. While face-to-face coordination and decision-making can certainly occur in this crowd network, its digital nature leaves open the likelihood of a shifting and reconfiguration of various sub-networks that emerge and disperse within the primary network. The example the authors use to illustrate this network is the global climate change protesters’ extensive use of Twitter.

The third type of network proposed by Bennett and Segerberg lies between the two previously described networks: the “organizationally enabled network” (Bennett and Segerberg 2013, 47). Even though organizations may have a presence in this network, they still surrender any coordinating role within it. These organizations are only loosely linked and remain in the background, limiting themselves to a moderating role. The outcome of the organizationally enabled network, like the crowd enabled network, tends to be connective action. Further, “communication content centers on organizationally generated inclusive personal action frames” (Bennett and Segerberg 2013, 47).

Bennett and Segerberg further discuss the distinction between collective action and connective action. Collective action requires high levels of organizational resources (such as money and equipment) to harness and coordinate individuals, which is done through the creation of collective identities formed around solidarity and trust. It is a

collective endeavor for public good, centered on a common cause. As a result, in collective action, digital media does not change the action dynamics of the situation. Digital media does, however, change the action dynamics of connective action. It acts as the main organizing agent and centers around personalized content sharing. Modern movements often contain varying degrees of both actions, and the use of one action will likely have an effect on the process of the other (Bennett and Segerberg 2013).

Earl and Kimport study the idea of this realm of connective action extensively (although they do not use this term). They divide connective action into three types, adding further complexity to the picture. First, they address “e-mobilizations” (Earl and Kimport 2011, 3), which they describe as a movement that is organized online but contains offline action. This type of mobilization occurred in the 2007 United for Peace and Justice protests against the war in Iraq, which brought over four hundred thousand people to the National Mall in Washington, DC. They next identify “e-movements” (Earl and Kimport 2011, 5), which are exclusively online movements with no offline component. Many of these movements can be seen during political campaigns as fundraising efforts or campaigning by third-party actors. Finally, “between these two poles lie numerous instances of collective action with varying degrees of off- and online components and varying degrees of affiliation with social movements and SMOs [social movement organizations]. We term these actions ‘e-tactics’” (Earl and Kimport 2011, 9). Their work focuses on the rise of e-tactics and their prominent use among modern organizations. They argue that the advantage of e-tactics is that they “can make the organizing of an action along with participation in it cheap and easy; they also clearly do a good job of aggregating individual efforts into collective campaigns” (Earl and Kimport



2011, 13). They proceed to analyze several cases that illustrate how the employment of e-tactics enhances the success of modern movements.

This section has explored the increasingly complex nature of modern organizations and networks. Early descriptions of modern digitally-enabled entities portray them as leaderless, spontaneous, and centerless. However, recent scholarship shows that soft leaders, often acting behind the scenes, orchestrate and control these entities. Traditional organizations have not only been surpassed by the growing importance of the individual, but complicated by the emergence of organization-less and hybrid organizations. As these various organizations fuse with individuals to form networks, the concept of a network is similarly complicated. The more traditional organizationally brokered networks which conduct collective action must now act with crowd enabled networks and organizationally enabled networks that conduct connective action. Even the concept of connective action is further separated into e-movements, e-mobilizations, and e-tactics.

Given this new scholarship that offers insight into the new and emerging elements of individuals, organizations, networks, and action, I next construct a framework that I believe accurately represents social/political action in today's world. This framework attempts to portray the fecund and inseparable way that social media is now integrated into modern action, and emphasizes the necessity of incorporating a strong digital component into any action situation.

#### A New Framework of Social/Political Action

Figure 1 represents the components of traditional collective action. As discussed earlier, organizations have historically played the lead role in collective action (Bimber,

Flanagin, and Stohl 2012). This traditional organization consists of individuals who are organized into a structured hierarchy (Gerbaudo 2012). This organization may directly conduct collective action or form a network of organizations through which to conduct collective action (Bennett and Segerberg 2013). The connecting lines are thicker to represent the stronger ties that exist between elements in this formal entity.

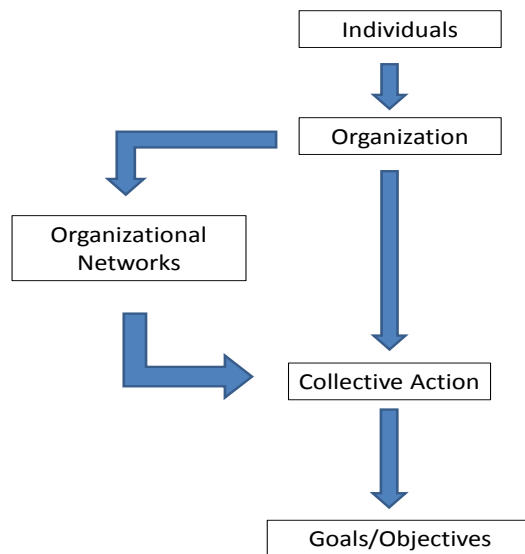


Figure 1. Traditional Social/Political Action Framework

*Source:* Created by author.

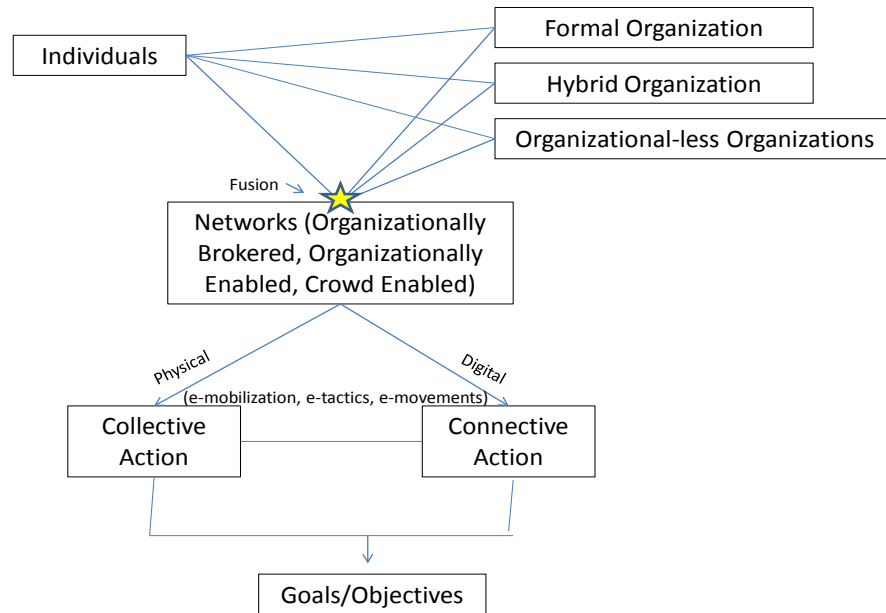


Figure 2. New Social/Political Action Framework

*Source:* Created by author.

In contrast, figure 2 illustrates the complexity of modern social/political action. In this framework, the individual plays a more prominent role as suggested by Shirky, Hands, Earl and Kimport, Bennett and Segerberg, and Bimber, Flanagan, and Stohl. The individual occupies a position horizontal to the organizations to reflect this increase of importance, with thinner lines of connection that represent the weaker ties discussed by Granovetter, Storck, Turkle, and Bennett and Segerberg. The three types of organizations that have emerged to replace the traditional formal organization due to the rise of the Internet and social media come from the ideas of Bennett and Segerberg. At the occurrence of the spark, Holloway's scream or Camus' no, individuals combine with any combination or all types of these organizations. This new entity, taken from Connolly's

political resonance machine, Hands' fused group, and Gerbaudo's popular reunion, forms the network.

The traditional framework illustrates the network as optional, and a coming together of two or more formal organizations. From Bimber, Flanagin, and Stohl, we see how this idea of the network has been complicated in a fashion similar to the way the idea of the organization has been complicated, which is due directly to the rising use of digital and social media. The three different types of networks take action through a combination of collective action and connective action, with the connective action incorporating Earl and Kimport's e-mobilization, e-movements, and e-tactics. It is all or a combination of these actions that ultimately work towards achieving the network's goals and objectives. Following the network's culmination, either in success or failure, Hands offers that this network will then dissolve.

The purpose of this section has been to describe the ways in which social media has altered the very landscape in which we all operate. The way we understand ourselves as individuals is changing, the nature of organizations has become more complex, and the formation of networks and the way they act have evolved into something new. Hence, I emphasize the point that almost any successful endeavor attempted by an organization (including the U.S. military) must include a digital media component. Given this new framework that I propose, which more accurately represents social and political action today, I next apply these ideas to unconventional warfare operations. The next section briefly describes UW and MISO. It then explores possibilities for social media usage by MISO in UW operations based on the new framework as well as some additional recent

scholarship in order to illustrate the degree to which this technology has the potential for greatly enhancing operational success.

### What is UW (and MISO)?

The U.S. Army's most current definition of UW is "activities conducted to enable a resistance movement or insurgency to coerce, disrupt, or overthrow a government or occupying power by operating through or with an underground, auxiliary, and guerrilla force in a denied area" (Department of the Army 2012, 2-2). It is important to emphasize that the end state of UW is not necessarily regime replacement, but may be any political effect that lies within U.S. strategic objectives. Equally important to note is that U.S. forces are not the only or even the primary actors in this operation, but operate through or with surrogate forces. These forces are divided into three separate elements: underground, auxiliary, and guerrilla forces.

All resistance movements contain an underground element. This is "a cellular covert element within unconventional warfare that is compartmentalized and conducts covert or clandestine activities in areas normally denied to the auxiliary and the guerrilla force" (Department of the Army 2012, 1-5). Underground forces typically assume the leadership role of the movement. Auxiliary forces provide support to the movement, typically in the form of logistics, labor, and/or intelligence. The auxiliary is likely to be sympathetic to the cause of the resistance but not necessarily committed, at least openly or publically, to the degree of the underground. Therefore, many auxiliary activities occur in more rural areas, where the risk of exposure to hostile government or occupying forces is reduced. The guerrillas "are a group of irregular, predominantly indigenous personnel organized along military lines to conduct paramilitary operations in enemy-held, hostile,

or denied territory” (Department of the Army 2012, G-5). Guerrillas conduct the majority of combat operations.

The UW mission is unique to SF. No other SOF element trains for this mission, and although SF soldiers are able to conduct the full spectrum of SOF missions they consider UW their primary mission. However, SF does not conduct UW unilaterally. The politically sensitive nature of UW and the emphasis on credible intelligence before conducting operations necessitates the involvement of multiple government agencies. “In UW, as in all conflict scenarios, U.S. military forces must closely coordinate their activities with interorganizational partners in order to enable and safeguard sensitive operations” (Department of the Army 2012, 2-2). As Petit says, “UW is inherently an interagency activity, which combines the military component of the U.S. Army Special Forces with the U.S. government agencies that possess the requisite authorities and capabilities to support a UW campaign” (Petit 2012, 23).

Throughout the Cold War, UW missions occurred with some regularity. Following the collapse of the Berlin Wall, however, UW missions became virtually non-existent to the point that by the turn of the century leaders in the special operations community considered removing UW from the training pipeline, and also as part of the SF mission set. The re-emergence appeared during the 2001 invasion of Afghanistan following the 9/11 attacks. In this campaign SF successfully employed UW to unite the Northern Alliance and assist them in overthrowing the Taliban from power. Similarly in 2003, a UW campaign in northern Iraq in which SF organized Kurdish fighting elements greatly complimented the conventional forces’ ground invasion from the south. Today UW has regained its prominence within SWCS and ARSOF.

Turning now to MISO, this force falls under the ARSOF umbrella along with SF and various other units. The primary MISO mission is to leverage the psychological aspects of a group of people within a population in order to “influence the perceptions and subsequent behavior of a target audience” (Department of the Army 2012, 2-7). In addition, the highly informational and sensitive nature of MISO often necessitates interagency collaboration. “MISO are also a DOD information capability used as part of interagency activities to achieve U.S. national objectives” (Department of the Army 2012, 2-7).

The highest degree of success that such an influence campaign can achieve is to cause the enemy to behave in a way that makes lethal action unnecessary, thereby preventing the heavy cost in money and lives of combat operations. As MISO primarily accomplishes this through the use of various media, social media logically falls into the toolkit of the MIS operator. FM 3-53, *Military Information Support Operations* (2013) mentions social media use by MISO often, but these references remain vague and are reserved for strategic level operations. I argue here that a tactically-run MISO campaign designed to augment the SF element and interagency partners conducting UW could potentially achieve the greatest results through the employment of social media to complement traditional UW operations. Before the decision to execute a UW operation solidifies, however, a social media campaign in what is informally known as “phase zero” could prove to be tremendously successful and even preclude further direct military involvement. The next section will explore the possibilities in phase zero.

### The Phase Zero Fight

Traditional joint doctrine presents the four phases of a military campaign as deter/engage, seize initiative, decisive operations, and transition. The stage preceding deter/engage has been informally referred to as phase zero, but the military has codified little formal writing or exploration of this idea until Charles Wald in 2006. According to Wald, “Phase Zero encompasses all activities prior to the beginning of Phase I—that is, everything that can be done to prevent conflicts from developing in the first place” (Wald 2006, 72-73). He says further, “the preventative focus of Phase Zero is less costly (in both blood and treasure) than a reactive approach to crisis. At the very least, Phase Zero helps set the conditions for an easier transition to a more comprehensive U.S. intervention in a crisis” (Wald 2006, 73). Thomas Galvin laments the underuse of phase zero intervention, stating that “there is a default tendency to equate the military with warfighting, misbalancing the resources needed for the military’s role in prevention, stabilization, and reconstruction” (Galvin 2007, 47). Applying this idea of phase zero planning and intervention to UW through the employment of social media yields some powerful and thought-provoking results.

In recent years there have been several significant scholarly findings in the area of nonviolent conflict, pioneered by Erica Chenoweth. In her book *Why Civil Resistance Works: The Strategic Logic of Nonviolent Conflict*, she analyzes 323 resistance campaigns between 1900 and 2006 and reaches some interesting empirical conclusions. First, the success rate of nonviolent campaigns is over twice that of violent campaigns overall, and since 2000 nonviolent campaigns are over four times more successful. When she analyses the success rates by campaign objective, she finds that nonviolent



movements are also over twice as likely to achieve all of their objectives as violent movements. Finally, the results of nonviolent campaigns are significantly more likely to endure than those of violent campaigns, whether the result is regime change or political concessions of sorts (Chenoweth and Stephan 2011). This finding represents a significant effect in the way that the military and interagency partners can view potential intervention in a country to accomplish its strategic goals, and particularly within UW regarding coercion, disruption, and regime change.

Chenoweth goes on to explain why nonviolent campaigns see such a higher success rate than their violent counterparts. A key component is the increased levels of public participation for nonviolent movements. “The moral, physical, informational, and commitment barriers to participation are much lower for nonviolent resistance than for violent insurgency” (Chenoweth and Stephan 2011, 10). In addition, nonviolent resistance is more likely to remain internal to a particular country or region, as opposed to violent struggles that usually involve foreign intervention or participation. “On the whole, nonviolent resistance campaigns are more effective in getting results and, once they have succeeded, more likely to establish democratic regimes with a lower probability of a relapse into civil war” (Chenoweth and Stephan 2011, 10). This is, of course, not to say that nonviolent campaigns achieve their goals in every instance, nor does Chenoweth make such a claim.

Andreas Bozoki supports this finding. He writes, “historical research has demonstrated that in most cases, nonviolent civil resistance is significantly more effective than armed confrontation” (Bozoki 2013, 841). He further points out, as also exhibited earlier in this chapter, that increasingly these opposition groups use Internet

communication technologies to enhance their movements. Simultaneously, he cautions not to overlook the potential dual-edged sword of social media usage, with authoritarian regimes using it as a way to identify and persecute activists. However, the opportunity still exists to identify potential and existing soft leaders who may be nudged towards cooperating with each other to achieve a mutually beneficial goal. If social media could be employed in this phase zero setting to encourage individuals and organizations within a certain country to carry out a successful nonviolent campaign that alleviates the threat to U.S. national security, the result would be far more preferable than deploying forces. The key to accomplishing this, looking at the new framework, is to mold the right ties between individuals and organizations and ignite them through a provocation or narrative.

This section has explored some additional unconventional ways of intervention through nonlethal force in a pre-UW environment. While shaping the environment in accordance with strategic goals, if the potential to support a locally based nonviolent movement in coercing, disrupting, or overthrowing a hostile ruling entity presented itself, such intervention would still lie within the definition of UW. Moreover, if such a nonviolent movement was successfully executed at phase zero, it would have a significantly greater chance of success than any ensuing military or guerrilla action as well as a higher probability of sustainable results. Finally, this end state could be accomplished at less cost and risk than by deploying troops for a UW mission. In such an endeavor, MISO could greatly enhance mission success through the skilled employment of social media. If, however, a threat to national security requires the initiation of UW,

the next section explores ways in which a social media campaign can nest within a traditional UW campaign.

### Social Media in UW

The importance of incorporating social media into UW is becoming increasingly necessary for a structural reason that was not fully explored in previous sections. All societies, even those who are less technologically advanced, are becoming more fractured, decentralized, and complex. In 2012, Fotini Christia published an analysis of alliance formations in civil wars, in which she analyzes every multiparty civil war between 1816 and 2007. A multiparty civil war involves more than two warring parties or groups within a country. She finds, among other things, that multiparty civil wars rose significantly during the previous century, from ten percent in the 1940s to over forty percent in the 1990s (Christia 2012, 14). The implications of this finding for UW is that there exists an increasing need to bring multiple groups together (as with the Northern Alliance in Afghanistan) to accomplish an objective. In creating this fusion, social media is a powerful agent.

Moises Naim explores this phenomenon as well, noting that “power is shifting from large, stable armies to loose bands of insurgents, from corporate leviathans to nimble start-ups, from presidential palaces to public squares” (Naim 2013, 40). The reason, he explains, is that people live longer, are healthier, and are more mobile now. These characteristics of the modern world transcend region and economic prowess. Increasing urbanization combined with mobile technologies also make populations more difficult to control, as many authoritarian regimes have learned the hard way over the last decade. Although some of these regimes remain successful at repressing opposition

movements that develop within their countries, the trends pointed out by Naim indicate that this will become increasingly difficult. As mobile technology and digital social media continue to penetrate the most isolated and perhaps the most controlled or economically depressed countries, the applicability of social media in UW campaigns increases in a parallel fashion.

Howard and Hussain offer as part of their conclusion in *Democracy's Fourth Wave?: Digital Media and the Arab Spring* a set of steps or phases for the successful uprisings across the Middle East and North Africa. Degrees to which movements in different countries followed these steps directly correlate with the levels of success in the outcomes of their movements. Also, of note, is that in many of the countries that were analyzed social media was heavily incorporated into these steps. The five phases they propose that led to successful Arab Spring resistance campaigns are preparation, ignition, protest, climax, and the follow-on information war. These phases bear an interesting resemblance to the phases of doctrinal UW, though they do not replicate them exactly. I now apply my framework and social media using Howard and Hussain's phases in place of UW phases in order to avoid any restriction issues with the distribution of this work from arising.

The preparation phase in a successful Arab Spring scenario involves "activists' use of digital media across time to build solidarity networks and identify collective identities and goals" (Howard and Hussain 2013, 103). As traditional UW focuses on establishing the connection between an SF element and the physical underground and guerrilla forces, this phase offers MISO the opportunity to examine any existing organization-less organizations and hybrid organizations that may be leveraged within the

auxiliary or neutral population as a whole. In addition, MISO should begin to identify soft leaders and potential choreographers, who likely reside in urban centers with a higher digital connectivity rate. MISO can further explore ways in which to massage or encourage these soft leaders to identify with the desired end state and begin to conglomerate into organizational-less organizations. As Gerbaudo expressed, successfully online action must contain a physical component in the streets. The involvement of guerrilla forces will most likely escalate any conflict into violence, but if soft leaders can create organizational-less organizations with a physical but nonviolent component, Chenoweth tells us that it will be more likely to receive broader participation among locals and will be more likely to succeed.

Petit discusses the idea of what he calls a “decentralized underground” (Petit 2012, 25). He states that “the proliferation of social media has introduced a new type of underground: a digitally connected, leaderless organization with varying levels of commitment to the cause” (Petit 2012, 25). This description seems to more accurately describe an effective auxiliary than an underground, as an underground traditionally fills leadership positions within a resistance movement. We must be careful, as the works of Gerbaudo and Bimber, Flanagan, and Stohl caution, not to overstate the characteristic of decentralization as a complete lack of leadership. Even though an underground can certainly be enhanced by digital media to be more decentralized and flexible, the hierarchy and leadership structure must remain intact and strong. Hence, the best use of social media in this phase is to connect the underground with certain individuals, along with organization-less and hybrid organizations within urban areas to enhance auxiliary and support potential for later phases.

The ignition phase gives these auxiliary elements a cause to unite and further strengthen their ties to accomplish a goal. The ignition results from “symbolically powerful moments . . . that served to galvanize the public” (Howard and Hussain 2013, 103). These powerful moments represent the no and scream that Hands discusses, exemplifying the growing power and prominence of the individual. Petit refers to this strength as “weapon of the narrative” (Petit 2012, 22). He points out, regarding the Arab Spring in particular, that “electronic narratives are so pervasive that they generate actions before ideologies are considered. Nearly all the Arab Spring insurrections lack ideological cohesion for governing; what they have in common are powerful narratives for dismantling. Social media enabled the proliferation of these powerful narratives” (Petit 2012, 26). This evolution of the narrative as a greater unifying mechanism than ideology exemplifies the prominence of individuals over organizations and even ideas. A MIS team using social media to enhance the penetration of this narrative in cooperation with auxiliary organizations and various soft leaders throughout the population could ignite a powerful political movement.

Based on my framework, this is the phase in which fusion occurs among various organizations and individuals to create a network or political resonance machine, which emerges toward a common goal. MISO and local partners can use social media to strengthen ties within this network and shape its narrative. This narrative can then be disseminated worldwide to enhance local, regional, and international support. It may be important in this phase to shape the narrative towards a nonviolent movement, at least initially, to increase participation within the network and support from outside it. Shaping the narrative in this way will also effect the beginning of the next phase.

The protest phase, according to Howard and Hussain, is where offline action first appears in public. Here, digital media orchestrates and coordinates action on the streets, which from my framework is the time for collective and connective action to occur. Further connective action serves to publicize actions taking place in the form of protests to a worldwide audience, granting legitimacy to the movement and providing a disincentive for the regime to respond with violence. All coordination through social media would come from the underground and soft leaders in cooperation with MISO.

Another characteristic of this phase that could potentially be enhanced through social media employment is the shaping of the emotion behind the protests. Wendy Pearlman believes that the emotions of the people are the most significant factor in determining whether or not action takes place, and in what form. She states:

Emotions such as fear, sadness, and shame promote pessimistic assessments, risk aversion, and a low sense of control. Such dispiriting emotions encourage individuals to prioritize security and resign to political circumstances, even when they contradict values of dignity. By contrast, anger, joy, and pride promote optimistic assessments, risk acceptance, and feelings of personal efficacy. Such emboldening emotions encourage prioritization of dignity and increase willingness to engage in resistance, even when it jeopardizes security. When instrumentality and values offer different answers to the question of whether to resign or rebel, therefore, emotions can shift individuals toward one or the other. (Pearlman 2013, 387)

The shaping and manipulation of emotions falls directly within the psychological purview of MISO. Based on Pearlman's theory, by using social media to encourage and extract the emotions of anger, joy, and pride, during this protest phase MISO could create the conditions for a motivated and capable resistance not easily suppressed by the ruling regime.

The pivotal phase comes with the climax phase, in which the regime determines how to best respond to the demands of the new movement. It may concede to the

movement's demands (by making concessions or stepping down from power), or may attempt a compromise, or may respond with suppression (Howard and Hussain 2013). At this point the underground determines whether the results are satisfactory for them or not. If concessions are made that appease the movement, the embedded resistance, and U.S. foreign policy, then the conflict terminates. Likewise, if the regime surrenders power the underground then moves forward to assume a leadership role in the country and the conflict terminates. However, if the response of the regime is violent oppression and the resistance feels that it must escalate force in response, a more traditional execution of UW unfolds.

Even if combat operations become a necessity, MISO and soft leaders can play a valuable role. Enhanced auxiliary networks would already be fused and could potentially assist with sabotage operations as well as enhancing operations conducted by the underground. Guerrilla forces could be afforded greater freedom of movement if chaotic conditions arise in areas where they are conducting operations. Crowds can effectively provide guerrilla forces with camouflage. Additionally, MISO would be able to coordinate the movements and activities of these networks through social media usage to deconflict or enhance combat operations.

During this phase the diligent coordination and management of violence becomes increasingly important, a task for which social media could prove to be enormously useful. Yale professor Stathis Kalyvas studies intra-state conflict extensively and argues that "actions 'on the ground' often turn out to be related to local and private conflicts rather than the war's driving (or 'master') cleavage" (Kalyvas 2003, 475). He proposes that even though the master cleavage represents the main divide or issue, once it occurs



countless other smaller cleavages emerge among participants. These smaller cleavages are the “interaction between political and private identities and actions” (Kalyvas 2003, 475), and they account for the majority of violence in intra-state conflict. Given this discovery, social media could provide the oversight and orchestration capability to limit these smaller cleavages and the resulting violence from them by encouraging a focus on the master cleavage and the common end state of the movement.

The final phase for Howard and Hussain’s model is the follow-on information warfare phase. In this phase, “various actors, state based and from international civic advocacy networks, compete to shape the future of civil society and informational infrastructure that made it possible” (Howard and Hussain 2013, 104). Joint doctrine commonly refers to this phase as the transition phase. In traditional UW, at this point the resistance leadership assumes control and begins consolidating their gains. This phase includes efforts to demobilize the population and extinguish pockets of regime-loyal fighters that have not surrendered. It also requires the greatest degree of interagency coordination and collaboration in providing humanitarian aid, restoring civilian institutions, and creating stable and representative political institutions.

Of great relevance to this phase is an idea put forth by John Braithwaite at the World Summit of Nobel Peace Prize Laureates in October, 2013. He asserts that “peacebuilding, peacekeeping, and postwar transition works better when civil society is engaged and creates networks or nodes of power that can effectively ‘check’ concentrations of power within more formal and traditional institutions” (Chenoweth 2013). If his theory is true, social media could be employed to enhance the success and longevity of a newly established government. As Hands believes that a fused group or

network will dissipate upon achieving its goals, the transition period would provide an opportunity to create and foster new organizations and networks to accomplish what Braithwaite suggests. Political resonance machines based around responsible, representative government institutions would replace those that emerged for the purpose of resistance and overthrow. In this way MISO, in collaboration with interagency partners, could greatly enhance a peaceful and stable transition through social media.

This chapter began by establishing the increasing prominence of digital and social media in activism and resistance movements, particularly in the last decade. To understand why this prominence is occurring, I analyzed recent scholarship that addressed this issue and was able to divide these findings into the effects on two significant actors within the structural environment: individuals, and groups of individuals. Using several of the most recent and relevant works that focus on the mutating characteristics of these actors as a direct result of the rise of social media usage, I created a new framework that more accurately represents social/political action today. Finally, I applied this framework to the UW mission using the phases of successful Arab Spring movements proposed by Howard and Hussain in order to illustrate the rich and diverse ways that MISO could employ social media to complement and greatly enhance a UW operation. In the final chapter, I present some conclusions from this analysis as well as recommendations on the continued study and application of this capability.

## CHAPTER 5

### CONCLUSIONS AND RECOMMENDATIONS

#### Conclusion

The last two sections of the last chapter often contain words like “could,” “potentially,” and “might.” These words are inevitable given the nature of this exploratory approach to the opportunities of social media to enhance UW. The purpose of this thesis is not to present rigid, mathematical procedures on appropriate employment of social media. Each country and every environment offers a starkly unique situation for both UW and for a social media campaign, requiring each mission to be carefully tailored to best exploit advantageous characteristics present in the environment. The purpose here is to show that not incorporating social media into UW, given the amount of rich scholarship that continues to point to the increasing importance of social media in social and political movements, is to neglect a powerful contributor that when leveraged appropriately could have an enormously enhancing effect.

This thesis began by examining Army doctrine and literature that suggests social media use as a complement to operations, but remains vague in description and recommendation. This gap in existing literature becomes more apparent when looking at recent DOD literature and reports that include both analyses and forecasts. To fill this gap, I use abductive reasoning by examining recent scholarly work on social media in resistance movements and creating a framework to illustrate the extent to which social media has altered the structural environment in which we operate. The most significant changes appear in the concept of the individual and the nature and complexity of organizations, networks, and collective action. Individuals are increasingly individualized

and empowered by the amplification of their voice and narrative. Organizations and networks have moved beyond traditional forms to become diverse and complex through digital media. The resulting action now includes connective action alongside traditional collective action as a means to enact change.

By applying this framework to UW through the phases of successful Arab Spring movements, I am able to recommend some ways to apply social media along more unconventional lines that appear within my new framework and have not previously been explored. Phase zero incorporates social media to accomplish U.S. strategic goals through the encouragement and orchestration of nonviolent (or possibly violent) movements, which have a higher chance of success and greater longevity. The preparation phase of UW involves identifying soft leaders and useful organizations and creating or encouraging connections among them. The ignition phase exploits the power of the narrative that causes separate elements to fuse together to form a network. The protest phase uses social media for coordination and momentum, as well as the shaping of emotions to achieve the desired effect. If popular demands are not appeased in the climax phase, the networks that exist are ripe to provide camouflage through protest action, provide intelligence, and even conduct sabotage missions. Finally, in the follow-on information warfare phase, social media can encourage the creation of positive networks to support the newly established institutions while balancing their power to prevent regression into past oppression.

### Recommendations

This work only scratches the surface of the potential for social media employment in military operations. I apply the new social/political action framework to UW because

this mission contains the most similarities to the protest and resistance movements discussed at the beginning of chapter 4. However, many other missions could be enhanced as well by using this framework as a guide for social media employment. Readily, foreign internal defense and counter-insurgency come to mind, but any operation in which U.S. forces are operating on foreign soil contains the possibility of enhanced mission success through the application of this framework. Further exploration into the framework's use in different missions would serve to provide a more rich and comprehensive set of options available.

Military inclusion of social media thus far has been fairly minimal, although the most recent UW doctrine does mention some uses. Much of this results from the extremely restrictive authorities regarding Internet usage, retaining online operations to the strategic levels of the military and other government agencies. However, it is incumbent on SOF, and specifically MISO, not to wait until authorization is handed down allowing social media usage at operational and tactical levels, but to push to obtain such authorization by illustrating the potential advantages of its use. In addition to staying abreast of the most recent media and information dissemination technologies, the MISO community must continue to monitor scholarly theories and findings in the sociological, political science, and intrastate conflict realms in order to stay at the cutting edge of the fight. Currently, I argue, that cutting edge today is social media employment.

## GLOSSARY

Army special operations forces. Those Active and Reserve Component Army forces designated by the Secretary of Defense that are specifically organized, trained, and equipped to conduct and support special operations. Also called ARSOF. (Department of the Army 2012, G-4)

auxiliary. For the purpose of unconventional warfare, the support element of the irregular organization whose organization and operations are clandestine in nature and whose members do not openly indicate their sympathy or involvement with the irregular movement. (Department of the Army 2012, G-4)

counterinsurgency. Comprehensive civilian and military efforts taken to defeat an insurgency and to address any core grievances. Also called COIN. (Department of the Army 2012, G-5)

foreign internal defense. Participation by civilian and military agencies of a government in any of the action programs taken by another government or other designated organization to free and protect its society from subversion, lawlessness, insurgency, terrorism, and other threats to its security. Also called FID. (Department of the Army 2012, G-5)

guerrilla force. A group of irregular, predominantly indigenous personnel organized along military lines to conduct military and paramilitary operations in enemy-held, hostile, or denied territory. (Department of the Army 2012, G-5)

military information support operations. Planned operations to convey selected information and indicators to foreign audiences to influence their emotions, motives, objective reasoning, and ultimately the behavior of foreign governments, organizations, groups, and individuals. The purpose of military information support operations is to induce or reinforce foreign attitudes and behavior favorable to the originator's objectives. Also called MISO. (Department of the Army 2012, G-6)

resistance movement. An organized effort by some portion of the civil population of a country to resist the legally established government or an occupying power and to disrupt civil order and stability. (Department of the Army 2012, G-6)

special forces. U.S. Army forces organized, trained, and equipped to conduct special operations with an emphasis on unconventional warfare capabilities. Also called SF. (Department of the Army 2012, G-6)

special operations. Operations requiring unique modes of employment, tactical techniques, equipment, and training often conducted in hostile, denied, or politically sensitive environments and characterized by one or more of the following: time sensitive, clandestine, low visibility, conducted with and/or

through indigenous forces, requiring regional expertise, and/or a high degree of risk. (Department of the Army 2012, G-7)

special operations forces. Those Active and Reserve Component forces of the Military Services designated by the Secretary of Defense and specifically organized, trained, and equipped to conduct and support special operations. Also called SOF. (Department of the Army 2012, G-7)

subversion. Actions designed to undermine the military, economic, psychological, or political strength or morale of a governing authority. (Department of the Army 2012, G-7)

unconventional warfare. Activities conducted to enable a resistance movement or insurgency to coerce, disrupt, or overthrow a government or occupying power by operating through or with an underground, auxiliary, and guerrilla force in a denied area. Also called UW. (Department of the Army 2012, G-8)

underground. A cellular covert element within unconventional warfare that is compartmentalized and conducts covert or clandestine activities in areas normally denied to the auxiliary and the guerrilla force. (Department of the Army 2012, G-8)

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